Change Household ID – Find Existing Household

Intro

This HuBERT on-demand training module…

Intro1

…is provided by the MN Department of Health WIC Program. It provides an overview of how to change the Household ID by adding to an existing household.

<transition>

Scenario

Today is January 30th.

Bea and Arya are being temporarily moved to foster care.

Bea has been assigned a new Household ID and her previously issued February benefits have been voided and will need to be reissued.

But first we are going to add Arya to Bea's new household.

Take a quick refresher look at Arya's Show Details panel then open her folder by double-clicking on her row.

<no audio – failure hint> Click on Arya's row to view her Show Details panel.

Open PF

<no audio – failure hint> Double-click Arya's row to open her Participant Folder.

<cursor spins>

Trans Hx

We've already checked the transaction history and know that the one redemption record was for 9 cans of formula for Bea.

Let's take a look at Arya's Benefits History.

Open Ben Hx

<no audio – failure hint> Click the **Benefits History** tab.

Ben Hx

We'll expand the nodes for January…

…and see that Arya's prescription is pretty standard except for the Soy Beverage.

OK. So let's change her Household ID. Remember where that function is found? Go ahead (click anywhere for a hint if unsure).

<no audio – failure hint> Click the **Participant Activities** menu.

Menu

<no audio – failure hint> Select **Change Household ID.**

Change HHID GS

Remember! We need to complete each step in order. Let's get started. Step 1. Click the Determine New Household link.

<no audio – failure hint> Click the **Determine New Household** link

<no audio> Click the **Determine New Household** link.

Find HH

This time, we want to add Arya to Bea's new household, which is an existing household.

Click that button.

<no audio> Click the **Find Existing Household** button.

Existing HH

The Find Existing Household pop-up lets us search using the Household ID or the address of that household.

ID on Card

Let's use Bea's new Household ID that we wrote on the back of her card.

<no audio> Click inside the **Household ID** field.

Type ID

Type the ID then click OK.

<no audio> Type the **Household ID** into the field and then click the **OK** button (or press the Enter key).

Select HH

The Select Existing Household window displays the address, telephone and authorized rep associated with it.

It's also where we select our Reason for the ID Change. Go ahead and select the appropriate reason.

<no audio – failure hint> Click the **Reason for ID Change** drop-down.

Reason

<no audio – failure hint> Select **Custody Change**.

Edit Rep

We can also edit the Authorized Rep from this window. Go ahead and click the button.

<no audio> Click the **Edit Auth Rep** button.

Edit Rep 1

The same fields that display in the Authorized Rep sections on other screens display here.

We aren't going to make any changes. Click Cancel to exit this window.

<no audio> Click the **Cancel** button.

Find Button

If this wasn't the correct household, say, we mis-typed the household ID, we could re-start our search of our existing household by clicking the Find button. Go ahead and click it.

<no audio> Click the **Find** button.

Find

See. Allows a quick do-over. But we're good. Click Cancel.

<no audio> Click the **Cancel** button.

Save Selected

To save our found household and the reason for the change, click the OK button.

<no audio> Click the **OK** button.

Change ID

We've moved Arya to the new household. Go ahead and click Close.

<no audio> Click the **Close** button.

Step 2

Second step. Remove Current Benefits.

<no audio> Click the **Remove Current Benefits** link.

Grids

Remember, the grid at the top has information for Arya's old household, which still includes Mama.

The Benefits for Current Month grid looks a little different this time.

Bea

When we looked at this for Bea, only formula was listed because she was the only member of the household issued formula.

Issued

With Arya, all issued foods are once again listed.

However, if the same foods were issued to other household members, the issued quantity is aggregated.

For instance, both Arya and Mama received 1 lb of cheese, 1 dozen eggs, 36 ounces of cereal, etc. and their quantities have been combined in the issued column.

Milk

So, let's take a look at milk.

We know from looking at the Benefits History that Arya was issued 3 gallons of Soy Beverage.

Soy Beverage

If Mama and Arya had been issued the same type of milk, that quantity would also be combined, but only 3 gallons are listed as issued.

If we hover over the Subcategory column in the Benefits to Remove for Current Month grid….

<no audio> Hover over the Subcategory column.

<no audio> Click when ready to continue.

Divvied

We can see that it is the Soy Beverage listed.

Since only 3 gallons are listed in the Issued column, we can assume Mama was issued regular low-fat milk, which won't be listed here because it wasn't also issued to Arya.

The Remaining column, as we saw before, is the quantities that have not yet been purchased.

The listed foods and remaining quantities are those that will be divvied up, or transferred to, the new household.

Remove Benefits

The Benefits to Remove for Current Month grid are the food items and quantities the system is suggesting be moved from the old household to Arya's new household.

Since there hasn't been any redemption, the system simply divvies as appropriate based on the participant's food package, or what was originally issued.

For instance, the cash-value benefit for children is 9 dollars and that is what the system is suggesting be transferred to Arya's new household.

Redemption

Dividing the food up is easy when there hasn't been any redemption.

But what if there were redemptions?

Let's take a look…

In this instance, Arya redeemed 1 dozen eggs, 1 quart yogurt, 1.5 gallons of milk and 36 ounces of cereal.

But we have to keep in mind that the WIC Processor assigns redemption of items issued to more than one member of the household in a relatively random manner.

Redemption 1

We should assess the food package being transferred.

Odds are the foods purchased will stay with the household that bought them and not be packed up to go with the child to their new home.

Redemption 2

In this example, we are moving Arya out of a household where there are 3 members that received a child's food package.

As we can see with the majority of the food items, the system divides the remaining amount by the number of members who received that item, regardless of who was assigned redemption.

If it can't be divided evenly by the number of members, the system will split it between the households as we see with yogurt.

Lastly, if the remaining amount can't be split the system will suggest that the item stay with the household, as we see with the remaining 1 dozen eggs.

<no audio> Click when ready to continue.

Transfer Eggs

In general, we can just accept what the system suggests.

However, if we think it best to transfer additional foods to the new household, the Quantity column is editable.

For instance, let's transfer the remaining 1 dozen eggs to the new household.

<no audio> Click the Quantity cell in the Eggs row.

<no audio> Type 1 then click the Breakfast Cereal cell right below.

Eggs

Easy enough, right?

OK. Back to our original Arya scenario.

<display> Quantity of 1 for eggs displays.

End Redemption

<transition slide>

Send EBT Data

Even if no changes are made, to complete this screen, we always click the Send EBT Data button.

<no audio> Even if no changes are made, to complete this screen, we always click the Send EBT Data button.

Cursor

<cursor spins>

Step 3

Step 3. Removing participant from household account. Click the link.

<no audio> Click the **Remove Cards** link.

Cursor

<cursor spins>

Remove Cards

Remember, this is the household we are transferring Arya out of.

We aren't making any changes, so what do we do? Go ahead.

<no audio – failure hint> Click the **Send EBT Data** button.

EBT HH Demo Msg

<no audio> Click OK or press the Enter key on the keyboard.

Cursor

<cursor spins>

Step 4

Step 4. Review New EBT Household Demographics. Click the link.

<no audio> Click the **Review New EBT Household Demographics** link.

Review New HH

Since we already added the Primary Card Holder and assigned the card when we created the household for Bea, we can simply complete the screen by doing…what? Go ahead.

<no audio – failure hint> Click the Authorized Representative row.

Step 5

Step 5.   Add Benefits to New Household.

<no audio> Click the **Add Benefits to New Household** link.

Aggregated

This time, the Aggregated Issuance for EBT Account screen opens immediately so that we can re-issue Arya's benefits to her new household.

Again, it only issues the current set of benefits.

We know what to do from here. Go ahead.

<no audio – failure hint> Click the **Send EBT Data** button.

Cursor

<cursor spins>

Exit Step 5

And click Close to exit.

<no audio > Click the **Close** button or press the Enter key on the keyboard.

Future Voided Msg

Again, the message informs us that Arya's future benefits were removed from old household's account.

Go ahead and click OK.

<no audio> Click OK or press the Enter key on the keyboard.

Close GS

And were done!

Before we close the Guided Script, Arya's household ID is 13594044.

And once we close it….

<no audio> Click the Close button.

Ben Hx After

…it is updated to the new household ID 13672744.

In Benefit's History, if we expand the first couple of nodes…

We can see the benefits issued to Arya's new household for January and that the February benefits have been voided.

Old January Set

And if we click on the node next to the set issued on 1/21…

<no audio> Click on the plus next to the 1/21/20 set of benefits.

…and expand the benefit node…

<no audio> Click on the plus next to benefit 36244328.

Voided January Set

…and expanded the node for each food item, we would see the voided quantities for the original January set issued.

OK. We've created a new household for Bea and added Arya to her existing household.

Both their January benefits were reissued by the Change Household ID Guided Script.

Next, we need to reissue their February benefits.

Go ahead and do that.

<no audio – failure hint> Click the **Issue Benefits** icon.

<cursor spins>

Issue Ben

They were issued January benefits today and for tri-monthly issuance, we would issue February and March as well.

Do what needs to be done to the suggested benefits starting with Arya then Bea and then continue issuing.

<no audio – failure hint> Click the checkbox next to Arya's April benefits to remove the checkmark.

Remove April

<no audio – failure hint> Click the checkbox next to Bea's April benefits to remove the checkmark.

Issue

<no audio – failure hint> Click the **Issue Benefits to Selected Members** button.

<cursor spins>

Verify FP

Let's make sure the foods being issued as expected. Click below the scroll bars…

<no audio> Click below the scroll bar.

Verify FP 1

<no audio> Click below the scroll bar.

Aggregated

Yep. Good to go. Go ahead and finish issuing then print the Account Balance.

<no audio – failure hint> Click the **Send EBT Data** button.

<cursor spins>

Close Aggregated

<no audio – hint after 5 seconds> This screen does not automatically close. Click the Close button or the X to exit.

Print

<no audio – failure hint> Click the **Benefit Management** menu.

Print 1

<no audio – failure hint> Select **Print EBT Account Balance.**

Print 2

<no audio – failure hint> Click the **Benefit Management** menu.

Print 3

<no audio – failure hint> Click the **Send to Printer** radio button.

<no audio> Click OK or press the Enter key on the keyboard.

<transition>

Account Balance

Go ahead and take a look at the account balance for Bea and Arya.

<no audio> Click when ready to continue.

Account Balance2

<no audio> Click when ready to continue.

<transition>

Account Balance-Mom

So this is mama's account balance, or Bea and Arya's old household's account balance, which now only lists those foods issued to MAMA.

<no audio> Click when ready to continue.

Set PIN

Remember, part of our responsibility is to assist the foster parent with setting the PIN for their new card, which we will need the foster parent's mail zip code and birth date to complete.

In Case of Participant Death

Participant Death

One last thing, we mentioned in the previous module that there are a couple of instances that required us to use the Change Household ID Guided Script.

One of these is if a participant dies.

A cheat sheet, In Case of Participant Death, is available on the MDH WIC website.

Participant Death 1

In general, if the participant is the only member of their household, we recommend deactivating the WIC card, terminating the deceased participant's current certification and writing an alert, which is optional.

If the participant is a member of a household with other participants, we recommend using the Change Household ID Guided Script to remove them from their current household, terminating the deceased participant's current certification and writing an alert, again which is optional.

Since using the guided script is not as straightforward in the case of participant death, we strongly encourage using the cheat sheet to assist with the process.

Questions & Answers

The next slides have some questions that we should be able to answer now that we've completed the Change Household ID Guided Script modules.

Question 1

The steps in the Change Household ID Guided Script can be completed in whatever order you want to complete them.

Answer 1

False. The steps of the Change Household ID Guided Script must be completed in the order they are displayed.

Question 2

In the Change Household ID Guided Script, you must click the Send EBT Data button in each screen it displays regardless of whether any changes are made in that screen.

Answer 2

True. The Send EBT Data must be clicked in each screen (if it displays) even if no changes are made to the screen.

Question 3

In the Change Household ID Guided Script, you cannot return to a completed step even if you need to correct or change something.

Answer 3

True. Each step is locked after it is closed. It cannot be re-opened to make corrections or changes. (These will need to be made in the Participant Folder once the Guided Script is completed).

Question 4

What doesn't the Change Household ID Guided Script do?

Answer 4

The system does not automatically deactivate a card. We would need to do that if appropriate.

Question 5

You should always deactivate the WIC Card BEFORE starting the Change Household ID Guided Script.

Answer 5

False. Do NOT void existing benefits or deactivate WIC Cards before changing the Household ID. These functions are performed by the Guided Script.

End

Thank you for reviewing this HuBERT on-demand training module presented by the MN Department of Health WIC Program.